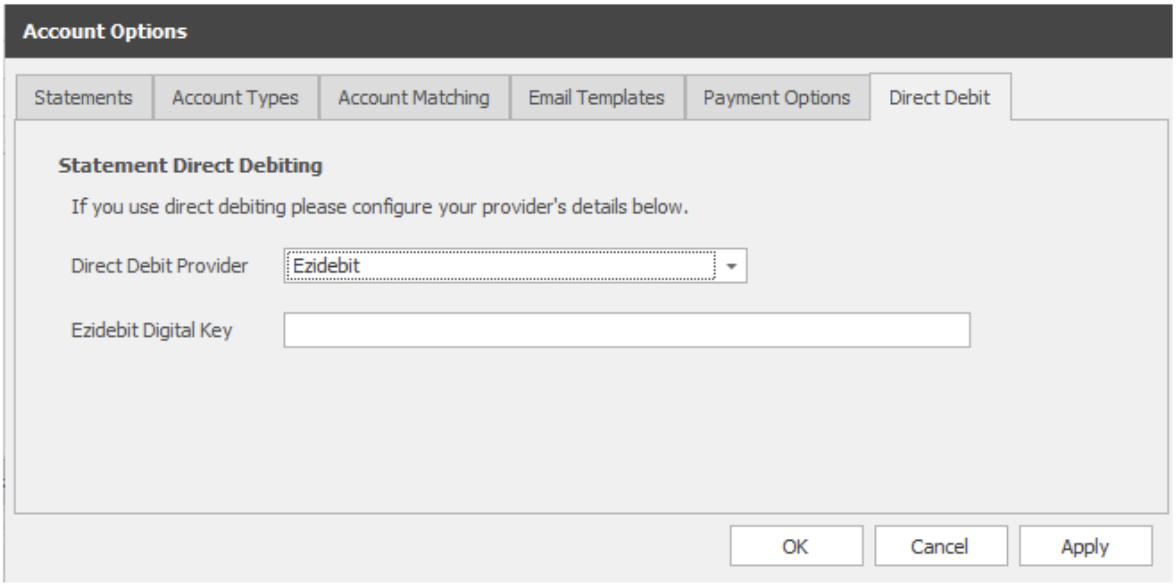
Setting up a FRED customer with direct debit

To support easier management of Account payments, Fred Office can now integrate to Ezidebit for Direct Debit payments.
You will need to apply for an Ezidebit account that can be linked with FRED Office.

To access the new setup option for Direct Debit in FRED:

- Select **Tools > Accounts > Options** then click the **Direct Debit** tab.
- Make sure Ezidebit is selected for the **Direct Debit Provider.**
- Enter the **Ezidebit Digital Key** provided in your Ezidebit welcome email and click OK.



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PO Box 3327
Newstead Q 4006

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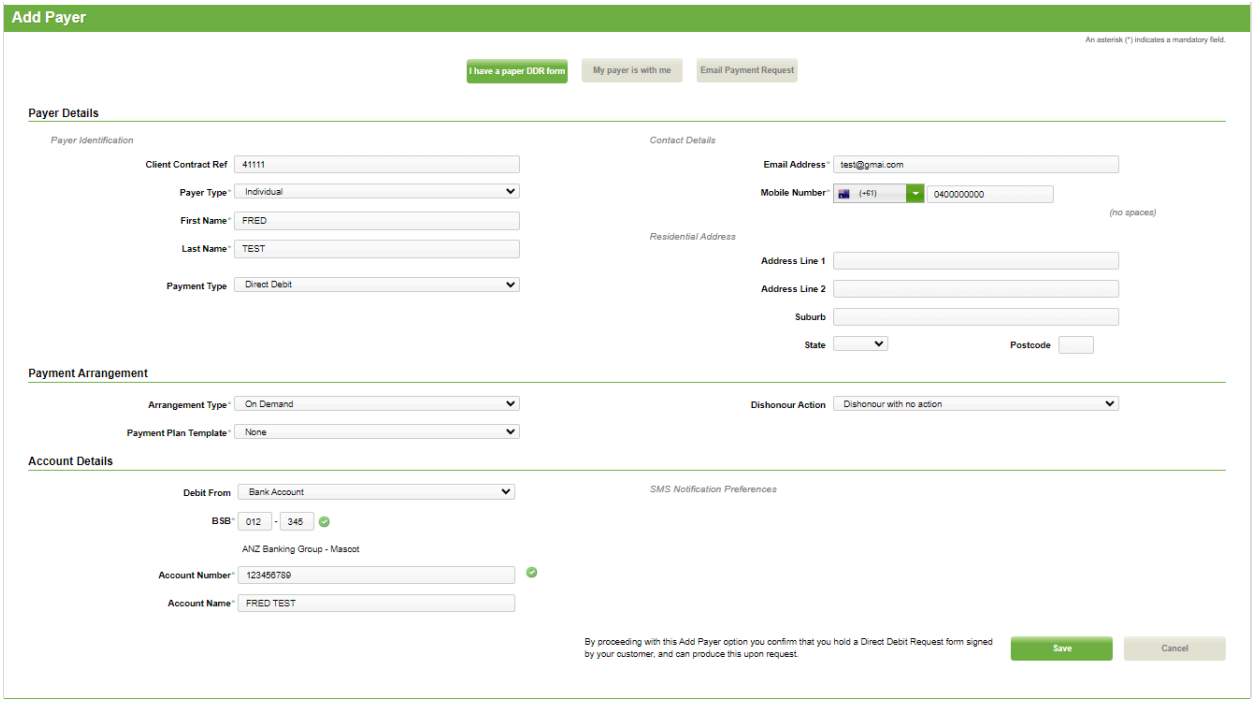
AFS License 315388

To create a new Direct Debit customer in Ezidebit:

- Login to the **Ezidebit portal (EziOnline)**. Your login details can be found in your Ezidebit welcome email
- Select **Payers > Add Payer > I have Paper DDR Form** (note there is also the option to send an electronic direct debit agreement to your customer)
- Enter the **FRED ID** number in the **Client Contract Reference** field
- Complete remaining customer details and change the **Arrangement Type > OnDemand**
- Click **Save**



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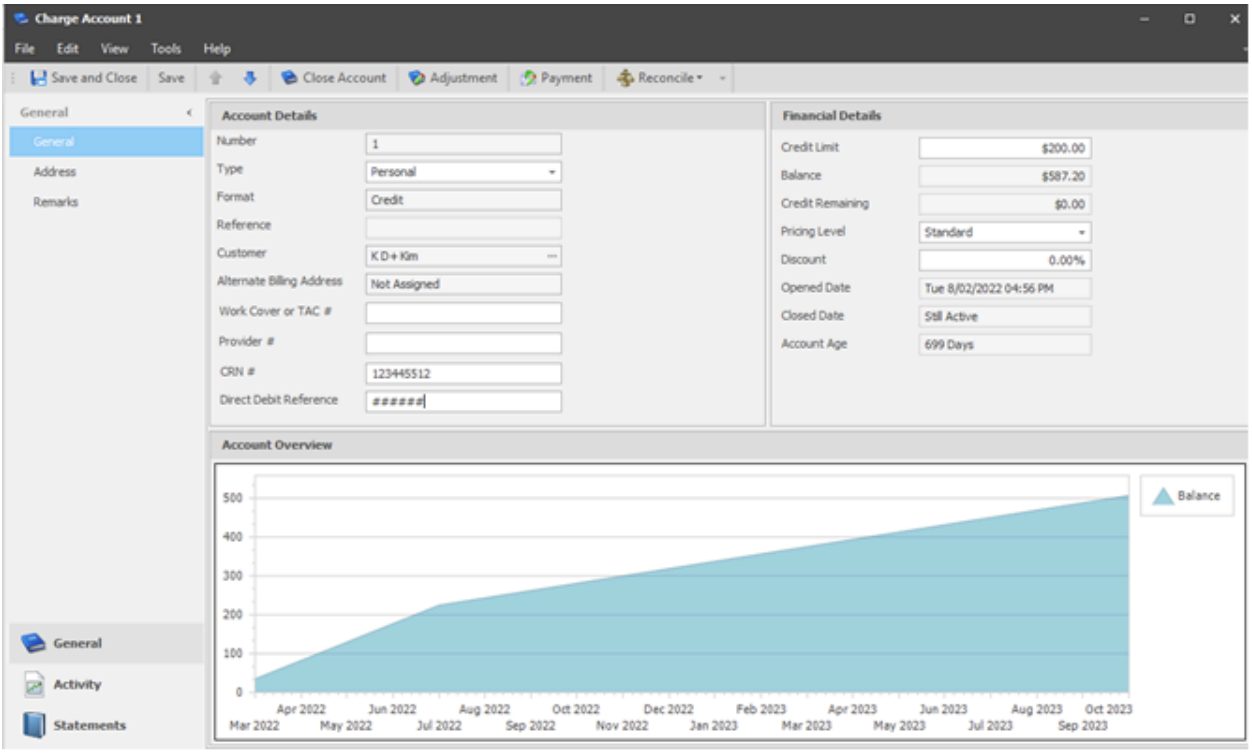
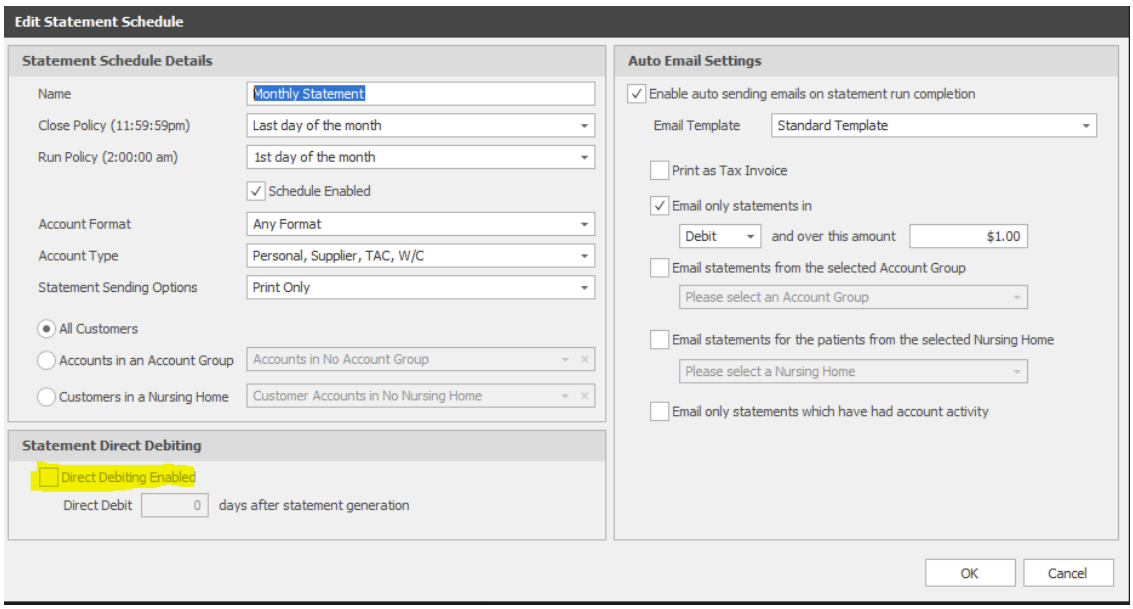
To link the newly created Ezidebit customer in FRED:

- Copy the **Ezidebit Client Contract Reference** field.
- Then, within the **Account Details** screen in FRED, paste to the **Direct Debit Reference** which will allow Fred Office to pass the account balance to Ezidebit Direct automatically for processing.

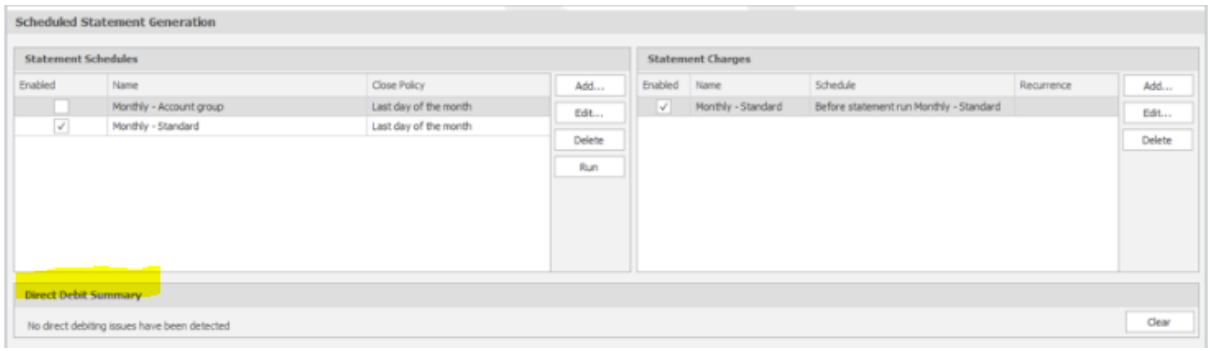


To initiate automatic billing through Ezidebit from FRED:

- Go to the **Statement Area > Edit Statement Schedule** and ensure the **Direct Debit Enabled** box is ticked.
- Here, you can nominate when the direct debit payments are to be **automatically** scheduled in Ezidebit each month (i.e. 5 days after the statement has been generated). This date will appear on the customer's statement for their reference.



- You can see a summary of all direct debit payments in **Statements > Direct Debit Summary.**



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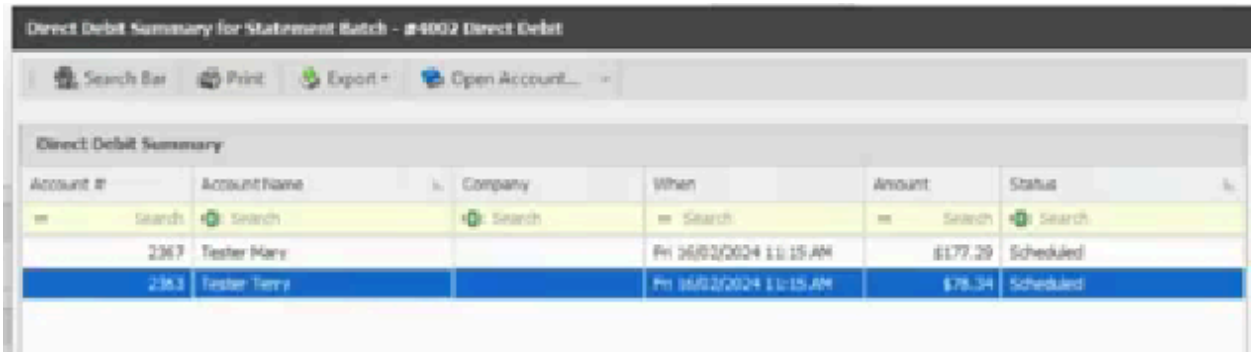
- The payment is confirmed in FRED office automatically once the payment has been processed **(Accounts>Account Activity > Activity Type = Direct Debit)**